PX23

PX23 Attachment O

Documents obtained from Lindsey Martinez's computer

From:	Javier Quintana <javier@revlive.net>
Sent:	Friday, March 24, 2017 10:12 PM
To:	'courtney' <courtney@revlive.net>; 'Jade Raber' <jade@revlive.net>; 'Lindsey Martinez' <lindsey@revlive.net>
Cc:	Jenny Johnson <jenny@revlive.net>
Subject:	Spartacus Scripting
Attach:	Spartacus Scripting - 3.23.17 (002).docx

From: Javier Quintana [mailto:javier@revlive.net]
Sent: Friday, March 24, 2017 2:31 PM
Subject: Spartacus Scripting

Some verbiage changes have been made to Scripting.   References "Intense Erections" have been replaced with "Enhanced performance". We thought this would be more comfortable verbiage for agents. Let me know if have any questions. Thanks!

Javier Quintana
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In Trial

Greeting - **Agent:** Thank you for calling Customer Care. My name is (AGENT NAME).May I please have your name and zip code?

Verification – Verify customer

Agent: Thank you and I see that you are using the (product name). This is an excellent product and our customers are always telling me about the great results they have with it. So, how may I help you?

REASON FOR CANCELLATION

Agent: I'm sorry to hear that. Most of our customer really like the (Product Name). What's the reason you're wanting to cancel your account today?

FACT FINDING

(Customer Name), let me ask you when you first ordered what was your goal…what were you looking to achieve?

BUILDING VALUE

(Customer Name), this amazing supplement has a unique formula that is designed to Maximize sexual benefits by increasing your sex drive, stamina and boosting energy levels. And the best part (Customer Name), since it's all natural you won't have any of those nasty side effects. So, tell me, how has it been working for you so far?

At this point we will need to select a Sub-Disposition for offers to appear:
- **Price**
- **Adverse Reaction**
- **It's Not Working**
- **Didn't Understand when Ordering/ Continuity Program**
- **Didn't Receive Product**
- **Returned to Sender on Product**
- **Not Happy with Previous Resolution**

PX23 Attachment O-2

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The following is your work flow based on the sub-disposition selected

PRICE

1. REDUCED CONTINUITY OFFER – 35%

Agent: I'd hate for price to be the issue. We're really confident you'll see results and reach your goals with continued use. Let's go ahead and apply a 35% lifetime discount so you're never paying full price. I'll make those changes now, Okay (Customer Name)

⇩

2. REDUCED CONTINUTY OFFER – 40%

Agent: I understand, but wow, I'm actually seeing here it will let me apply a 40% lifetime discount. That's less than $2.00 a day and (Customer Name), you just can't put a price on having an amazing sex life! Okay, (Customer Name)

⇩

3. REDUCED CONTINUITY OFFER – 50%

Agent: I really want you to be able to use the (product name) & (product name) consistently! I know you're going to love the incredible results. (Customer Name), at the end of the day my job is to help you reach your goals, so I'm going to extend to you a very special lifetime discount of 50% off. That's **just** $46.99 a month, which is just over $1.00 a day. Enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

⇩

4. Save Sale of $18.71 to Keep Trial Product

Agent: We can definitely cancel your account and typically we request that you return your initial shipment since you're still in the trial, but I'd love for you to keep it and see the amazing results for yourself. So rather than pay the full price of $93.99 or sending it back, we can do a one-time special reduced price of just $18.71 and still cancel the account today! Okay, (Customer Name)?

⇩

4. Clean Cancel

***If the customer declines simply cancel the account. No return of the product is needed.** [Read Cancellation Disclosures]

PX23 Attachment O-3

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ITS NOT WORKING

1. Trial Extension – 7 Days

> **Agent:** (Customer Name), with this being all natural it can take a week or two to build up in your system and over the next 30-90 days of consistent use is where you'll really see results. With that being said, let's extend your trial period by an extra week (7 days) to give it some more time. Ok (Customer Name)?

⇩

2. REDUCED CONTINUTY OFFER – 35% + Trial Extension – 7 Days

> **Agent:** (Customer Name), with the extension I can also apply a 35% lifetime discount, so if you decide to stay with the product, you'll never be paying full price. That's an amazing deal for amazing results. I'll set this up now for you. Ok (Customer Name)?

⇩

3. REDICED CONTINUITY OFFER – 50% + Trial Extension – 10 Days

> **Agent:** I really want you to be able to use the (product name) & (product name) consistently! I know you're going to love the incredible results. Customer Name), at the end of the day my job is to help you reach your goals, so I'm going to extend your trial 10 days and I'm going to apply a very special lifetime discount of 50% off. That's <u>just</u> $46.99 a month, which is just over $1.00 a day. Enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)

⇩

4. Save Sale of $18.71 to Keep Trial Product

> **Agent:** We can definitely cancel your account and typically we request that you return your initial shipment since you're still in the trial, but I'd love for you to keep it and see the amazing results for yourself. So rather than pay the full price of $93.99 or sending it back, we can do a one-time special reduced price of just $18.71 and still cancel the account today!.Okay, (Customer Name)?

⇩

5. Clean Cancel

If the customer declines simply cancel the account. No return of the product is needed. [Read Cancellation Disclosures]

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ADVERSE REACTION

(Customer Name), I'm sorry to hear that. Are you taking the product twice a day?

1. Trial Extension – 7 Days

> **Agent:** (Customer Name), our product is all natural, so side effects are very uncommon, however, I want you to cut the dose down to 1 a day. Do this for a week and then go back to the normal recommended dose if symptoms have cleared. I'm going extend your trial period by an extra week (7 days) to give it some more time. Ok (Customer Name)?

⇩

2. REDICED CONTINUITY OFFER – 50% + Trial Extension – 10 Days

> **Agent:** (Customer Name), by cutting the dose in half you will give your body time to adjust and build up a tolerance for the product without side effects. I'm going to extend your trial 10 days and I'm going to extend to you a very special lifetime discount of 50% off. That's **just** $46.99 a month, which is just over $1.00 a day. Enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

⇩

3. Clean Cancel

If the customer declines simply cancel the account. No return of the product is needed. [Read Cancellation Disclosures]

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DIDN'T RECEIVE PACKAGE

1. Scripting

> **Agent:** Let's go ahead and verify your shipping address one more time. Go ahead and provide that for me please.

***If Address Is Correct and Product Shows Shipped Track Package (USPS.COM). Provide tracking details to customer. If product shows delivered provide tracking # to the customer and advise them to contact their post office first to see if they have the package.

*** If customer does not want to call the post office then ….***

2. Trial Extension – 7 Days + Reship Request

> **Agent:** (Customer Name), no problem. As a courtesy, I'm going to reship you out this product free of charge and extend your trial period by a week (7 days). This way you have plenty of time

to receive the product and see the amazing results for yourself. I'll rush that shipment out right now for you. Ok (Customer Name)?

2. **Trial Extension – 10 Days + Reship Request**

Agent: (Customer Name), I understand the hesitation, but you did order the product with a goal in mind. It would be a shame to give up on that goal before even receiving the product. Let's extend your trial period 10 days, so you have even more time. I'll rush this right out to you and soon you will see the amazing results for yourself. Ok (Customer Name)?.

⇩

3. **REDUCED CONTINUTY OFFER – 40% + Trial Extension 10 Days + Reship Request**

Agent: (Customer Name), I know you're going to love the incredible results at a fraction of the cost, if you just give it enough time to work. So I'm going to extend your trial 10 days and I'm going to extend to you a very special lifetime discount of 40% off. That's **just** $56.39 a month, which is just over $1.00 a day. Enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

⇩

4. **Clean Cancel**

If the customer declines simply cancel the account. No return of the product is needed. [Read Cancellation Disclosures]

_____

RETURNED TO SENDER ON PRODUCT

1. **Clean Cancel**

Agent: (Customer Name), I am so sorry you did not want to opportunity to Maximize your sexual benefits by increasing your sex drive, stamina and boosting energy levels. I will cancel your account and you should receive no further shipments or charges. Ok (Customer Name)? [Read Cancellation Disclosures]

_____

DIDN'T UNDERSTAND WHEN ORDERING/ CONTINUITY PROGRAM

1. **REDUCED CONTINUITY OFFER – 50%**

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Agent: I really want you to be able to use the (product name) & (product name) consistently! I know you're going to love the incredible results. (Customer Name), at the end of the day my job is to help you reach your goals, so I'm going to extend to you a very special lifetime discount of 50% off. That's **just** $46.99 a month, which is just over $1.00 a day. Enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

⇩

3. Save Sale of $18.71 to Keep Trial Product

Agent: We can definitely cancel your account and typically we request that you return your initial shipment since you're still in the trial, but I'd love for you to keep it and see the amazing results for yourself. So rather than pay the full price of $93.99 or sending it back, we can do a one-time special reduced price of just $18.71 and still cancel the account today! Okay, (Customer Name)?

⇩

4. Clean Cancel

*If the customer declines simply cancel the account. No return of the product is needed. [Read Cancellation Disclosures]

NOT HAPPY WITH PREVIOUS RESOLUTION

1. Scripting

Agent: I am so sorry about your experience. Let me help make sure we can meet your resolution today. Okay, (Customer Name)?

Agent: Can you please describe in detail the issue you are having and the resolution you are looking for.

Agent: I am going to escalate this to my supervisor to make sure we get you the resolution you are looking for. You can expect a call back within the next 2-3 business days. Please take my name down if there are any questions or concerns in that time.

*** Escalate to supervisor – if this is outside of the policy you will escalate to queue to get to corporate

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Post Trial/Ongoing

Greeting - **Agent:** Thank you for calling Customer Care. My name is (AGENT NAME).May I please have your name and zip code?

Verification – Verify customer

Agent: Thank you and I see that you are using the (product name). This is an excellent product and our customers are always telling me about the great results they have with it. So, how may I help you?

Agent: I'm sorry to hear that. Most of our customer really like the (Product Name). What's the reason you're wanting to cancel your account today?

REASON FOR CANCELLATION

Agent: I'm sorry to hear that. Most of our customer really like the (Product Name). What's the reason you're wanting to cancel your account today?

⇩

FACT FINDING

(Customer Name), let me ask you when you first ordered what was your goal…what were you looking to achieve?

⇩

BUILDING VALUE

(Customer Name), this amazing supplement has a unique formula that is designed to Maximize sexual benefits by increasing your sex drive, stamina and boosting energy levels. And the best part (Customer Name), since it's all natural you won't have any of those nasty side effects. So, tell me, how has it been working for you so far?

At this point we will need to select a Sub-Disposition for offers to appear:
- **Price**
- **Adverse Reaction**
- **It's Not Working**
- **Didn't Understand when Ordering/ Continuity Program**
- **Didn't Receive Product**
- **Returned to Sender on Product**
- **Not Happy with Previous Resolution**

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PRICE

1. REDUCED CONTINUITY OFFER – 50%

> **Agent:** I'd hate for price to be the issue. We're really confident you'll see results and reach your goals with continued use. Let's go ahead and apply a 50% lifetime discount so you're never paying full price. I'll make those changes now, Okay (Customer Name)

⇩

2. REDUCED CONTINUITY OFFER – 65%

> **Agent:** I understand, but wow, I'm actually seeing here it will let me apply a 65% lifetime discount. That's just over $1.00 a day. (Customer Name), you just can't put a price on having an amazing sex life! Okay, (Customer Name)

⇩

3. REDUCED CONTINUITY OFFER – $25.00/Month

> **Agent:** (Customer Name), I know you're going to love the incredible results at a fraction of the cost, if you just give it enough time to work. (Customer Name), at the end of the day my job is to help you reach your goals, so I'm going to extend to you a very special lifetime discount and lock you in at $25.00 a month. That's just 83 cents a day for enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

⇩

4. Clean Cancel

> **Agent:** We can definitely cancel your account today. [Read Cancellation Disclosures]

*If the customer declines the above offers simply cancel the account.

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ITS NOT WORKING

1. Scripting - Extend Billing Pre-Offer – 10 Days

> **Agent:** (Customer Name), with this being all natural it can take some time to build up in your system and over the next 30-90 days of consistent use is where you'll really see results. With that being said, let's give it some more time and I guarantee you will see results like our other customers. Ok (Customer Name)?

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2. Extend Billing – 10 Days

Agent: (Customer Name), I understand, but I really want you to reach your goal. Not only are you going to be happy, but so is your partner. And let's be honest, a happy partner means a happy life. So, let's extend your next billing by 10 more days to you give plenty time to see the amazing results yourself. I'll set all this up now for you. Ok (Customer Name)?

⇩

3. REDUCED CONTINUITY OFFER - $39.00/Month

Agent: (Customer Name), I know you're going to love the incredible results at a fraction of the cost, if you just give it enough time to work. In fact it sounds like your body is just not reacting to the normal dosage, which is fairly normal. I want you to go ahead and increase your dosage. Take 1 extra pill a day and do this for the next 30 days. I guarantee the results will be incredible. In fact, I'm so positive, I'm going to extend to you a very special lifetime discount of **just** $39.99 a month, which is just over $1.00 a day for enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

⇩

4. Clean Cancel

Agent: We can definitely cancel your account today. [Read Cancellation Disclosures]

*If the customer declines the above offers, simply cancel the account..

Returned to Sender on Product

1. Clean Cancel + Reship

Agent: (Customer Name), I am so sorry you did not want to opportunity to Maximize your sexual benefits by increasing your sex drive, stamina and boosting energy levels. I will cancel your account and you should receive no further shipments or charges. Ok (Customer Name)? [Read Cancellation Disclosures]

COMPLETION BILLING. WHY WAS I CHARGED? TERMS AND CONDITONS

Agent: (Customer Name), when the order was placed it was for a 14 day trial. You pay just the shipping and handling and we send out a full 30 day supply of the product. Now, you can cancel at any time before or after the trial, but once the trial period expires the full cost for the initial shipment is charged.

*Customer does not agree with terms explanation

Agent: (Customer Name), it sounds like you're very frustrated here and I completely understand. I really do want to help you out. I'm going to be honest with you. I've ordered plenty of things

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online and in my excitement I've missed the terms and conditions. Once that order is placed we are bound to the legal terms. But, let's look past that for a moment. At the end of the day it's my job to help you reach your goal. Enhanced performance, no side effects and most importantly a satisfied partner. Let's do this (PROCEED TO NEXT OFFER)

⇩

2. REDUCED CONTINUITY OFFER – 50%

Agent: I'd hate for price to be the issue. We're really confident you'll see results and reach your goals with continued use. Let's go ahead and apply a 50% lifetime discount so you're never paying full price. I'll make those changes now, Okay (Customer Name)

⇩

3. Scripting

Agent: (Customer Name), unfortunately all sales are final. However, your account has been fully cancelled and you will receive nothing further.

⇩

Agent: I think I see where the confusion may be. It shows here that the order was placed for the 14 day trial. You have that time to try out the product and once the trial ends you're billed for the initial shipment and that's why we're seeing that charge there, but since the legal terms and conditions were agreed to by placing the order we can't process a refund. But, your account has been fully cancelled and you will receive nothing further.

⇩

Agent: I understand (Customer Name). Let me see what I can do for you. One moment… (Pause for a few seconds)… (Customer Name,) I reviewed the terms and unfortunately as stated after the 14 day trial period, all sales are final and no returns will be accepted for a refund. But, don't worry, the account has been cancelled going forward and you will receive no future shipments or charges. Ok, (Customer Name)?

Agent: (Customer Name), I understand. I really do. We want all of our customers to be satisfied, especially when it comes to reaching their goals. I can't do anything about the previous charges, but I can make sure that you won't be charged again in the future. Your account has been completely cancelled. Please take down the following cancellation number for your records.

** PROCESS CLEAN CANCEL AND RESHIP OFFER

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Didn't Understand When Ordering/ Continuity Program

1. **REDUCED CONTINUITY OFFER – 50%**

    Agent: I understand (Customer Name). The autoship simply allows you to receive the product every month without ever running out or having to call us. This way you get to continue to enjoy the amazing results without interruption.

    Agent: I'd hate for price to be the issue. We're really confident you'll see results and reach your goals with continued use. Let's go ahead and apply a 50% lifetime discount so you're never paying full price. I'll make those changes now, Okay (Customer Name)

    ⇩

2. **Clean Cancel**

    Agent: We can definitely cancel your account today. [Read Cancellation Disclosures]

    COMPLETION BILLING. WHY WAS I CHARGED? TERMS AND CONDITONS

    Agent: (Customer Name), when the order was placed it was for a 14 day trial. You pay just the shipping and handling and we send out a full 30 day supply of the product. Now, you can cancel at any time before or after the trial, but once the trial period expires the full cost for the initial shipment is charged.

*_Customer does not agree with terms explanation_*

    Agent: (Customer Name), it sounds like you're very frustrated here and I completely understand. I really do want to help you out. I'm going to be honest with you. I've ordered plenty of things online and in my excitement I've missed the terms and conditions. Once that order is placed we are bound to the legal terms. But, let's look past that for a moment. At the end of the day it's my job to help you reach your goal. Enhanced performance, no side effects and most importantly a satisfied partner. Let's do this (PROCEED TO NEXT OFFER)

3. **REDUCED CONTINUITY OFFER - $39.00/Month**

    Agent: (Customer Name), I know you're going to love the incredible results at a fraction of the cost, if you just give it enough time to work. I guarantee the results will be incredible. In fact, I'm so positive, I'm going to extend to you a very special lifetime discount of **just** $39.99 a month, which is just over $1.00 a day for enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

    ⇩

3. Scripting

Agent: (Customer Name), unfortunately all sales are final. However, your account has been fully cancelled and you will receive nothing further.

⇩

Agent: I think I see where the confusion may be. It shows here that the order was placed for the 14 day trial. You have that time to try out the product and once the trial ends you're billed for the initial shipment and that's why we're seeing that charge there, but since the legal terms and conditions were agreed to by placing the order we can't process a refund. But, your account has been fully cancelled and you will receive nothing further.

⇩

Agent: I understand (Customer Name). Let me see what I can do for you. One moment… (Pause for a few seconds)… (Customer Name,) I reviewed the terms and unfortunately as stated after the 14 day trial period, all sales are final and no returns will be accepted for a refund. But, don't worry, the account has been cancelled going forward and you will receive no future shipments or charges. Ok, (Customer Name)?

Agent: (Customer Name), I understand. I really do. We want all of our customers to be satisfied, especially when it comes to reaching their goals. I can't do anything about the previous charges, but I can make sure that you won't be charged again in the future. Your account has been completely cancelled. Please take down the following cancellation number for your records.

*If the customer declines the above offers, simply cancel the account with a clean cancel..
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Adverse Reaction

1. Scripting

Agent: (Customer Name), I'm sorry to hear that. Are you taking the product twice a day?

Agent: (Customer Name), our product is all natural, so side effects are very uncommon, however, I want you to cut the dose down to 1 a day. Do this for a week and then go back to the normal recommended dose if symptoms have cleared.
* If customer still wants to cancel

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2. Clean Cancel

Agent: We can definitely cancel your account today. [Read Cancellation Disclosures]

COMPLETION BILLING. WHY WAS I CHARGED? TERMS AND CONDITONS

Agent: (Customer Name), when the order was placed it was for a 14 day trial. You pay just the shipping and handling and we send out a full 30 day supply of the product. Now, you can cancel

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at any time before or after the trial, but once the trial period expires the full cost for the initial shipment is charged.

If the customer declines the above offers simply cancel the account. Confirm address and send reship

_____

Didn't Receive Package

1. Scripting

Agent: Let's go ahead and verify your shipping address one more time. Go ahead and provide that for me please.

***If Address Is Correct and Product Shows Shipped Track Package (USPS.COM). Provide tracking details to customer. If product shows delivered provide tracking # to the customer and advise them to contact their post office first to see if they have the package.

*** If customer does not want to call the post office then ….***

2. Extend Next Billing Date – 7 Days + Reship Request

Agent: (Customer Name), no problem. As a courtesy, I'm going to reship you out this product free of charge and extend your next billing period by a week (7 days). This way you have plenty of time to receive the product and see the amazing results for yourself. I'll rush that shipment out right now for you. Ok (Customer Name)?

⇩

3. REDUCED CONTINUTY OFFER – 40% + Move Next Billing Date 10 Days + Reship Request

Agent: (Customer Name), I understand the hesitation, but you did order the product with a goal in mind. It would be a shame to give up on that goal before even receiving the product. Let's extend your next billing date 10 days, so you have even more time. I know you're going to love the incredible results at a fraction of the cost, if you just give it enough time to work. I'm going to extend to you a very special lifetime discount of 40% off. That's **just** $56.39 a month, which is just over $1.00 a day. Enhanced performance, no side effects and most importantly a satisfied partner. I'll go ahead and set this up now. Ok (Customer Name)?

⇩

4. Clean Cancel

If the customer declines simply cancel the account. No return of the product is needed. [Read Cancellation Disclosures]

Agent: We can definitely cancel your account today. [Read Cancellation Disclosures]

COMPLETION BILLING. WHY WAS I CHARGED? TERMS AND CONDITONS

Agent: (Customer Name), when the order was placed it was for a 14 day trial. You pay just the shipping and handling and we send out a full 30 day supply of the product. Now, you can cancel

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at any time before or after the trial, but once the trial period expires the full cost for the initial shipment is charged.

If the customer declines the above offers simply cancel the account. Confirm address and send reship

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Not Happy With Previous Resolution

1. Scripting

> **Agent:** I am so sorry about your experience. Let me help make sure we can meet your resolution today. Okay, (Customer Name)?
>
> **Agent:** Can you please describe in detail the issue you are having and the resolution you are looking for.

IF NEEDED:
2. Scripting

> **Agent:** (Customer Name), unfortunately all sales are final. However, your account has been fully cancelled and you will receive nothing further.

⇩

> **Agent:** I think I see where the confusion may be. It shows here that the order was placed for the 14 day trial. You have that time to try out the product and once the trial ends you're billed for the initial shipment and that's why we're seeing that charge there, but since the legal terms and conditions were agreed to by placing the order we can't process a refund. But, your account has been fully cancelled and you will receive nothing further.

⇩

> **Agent:** I understand (Customer Name). Let me see what I can do for you. One moment… (Pause for a few seconds)… (Customer Name,) I reviewed the terms and unfortunately as stated after the 14 day trial period, all sales are final and no returns will be accepted for a refund. But, don't worry, the account has been cancelled going forward and you will receive no future shipments or charges. Ok, (Customer Name)?

> **Agent:** (Customer Name), I understand. I really do. We want all of our customers to be satisfied, especially when it comes to reaching their goals. I can't do anything about the previous charges, but I can make sure that you won't be charged again in the future. Your account has been completely cancelled. Please take down the following cancellation number for your records.

IF NEEDED:
3. Scripting

> **Agent:** I am going to escalate this to my supervisor to make sure we get you the resolution you are looking for. You can expect a call back within the next 2-3 business days. Please take my name down if there are any questions or concerns in that time.

*** **Escalate to supervisor –** if this is outside of the policy you will escalate to queue to get to corporate

Escalate case to supervisor with detailed notes on what took place and what customer is asking.

Threat Policy

No Threats = No Refunds

Type of Offer	Threats	Action to be Taken
35%/50%/100% Offer	Bank, Dispute, Credit Card Company, Media, lawyer, Scam, Consumer Affairs	Offer 35% / if not satisfied 50% / if not satisfied 100%
50%/100% Offer	BBB, Police, Bank Rep on the Line	Offer a refund of 50% / If not satisfied refund 100%. *This includes when bank rep is on the line.
Immediate 100% Refund	Government Agencies: Attorney General, FTC, Federal Agencies, Department of Justice	Offer an immediate 100% refund as soon as this type of threat is mentioned.
100% Including S&H	Fraud Claims - Claiming Not to Have Ordered Trial	Offer an immediate 100% refund In Trial. Escalate for S&H charges

Customer Threatens – BANK, DISPUTE, CREDIT CARD COMPANY, MEDIA, LAWYER, SCAM, CONSUMER AFFAIRS)

1. **INSTANT REFUND – 35%**

   Agent: (Customer Name), no need for that. I understand you're frustrated and I really want to help you out. So, please just hear me out and we will find a mutual resolution. Now, when the order is placed it does fully explain the program and billing for the products. With the charge occurring before cancellation we're not to issue a full refund, but as a one-time courtesy because I want to help you out, I can process a 35% immediate refund and you won't see any other charges This will go back to the original method of payment within 3-5 business days. Ok, (Customer Name)

   Customer declines

   ⇩

2. **INSTANT REFUND – 50%**

   Agent: Again, we're a bit limited here since that charge is for the product you already have, but let me check again to see if there is any way we can get a larger refund approved. (Pause) Okay, (Customer Name), as a courtesy we will issue a 50% refund that you'll see in 3-5 business days

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depending on your bank. Let me give you your refund confirmation number. Ok (Customer Name)?

Customer declines process full refund

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3. INSTANT REFUND – 100%

Customer declines previous two offers, process full refund

Customer Threatens – BBB, POLICE

1. INSTANT REFUND – 50%

Agent: (Customer Name), no need for that. I understand you're frustrated and I really want to help you out. So, please just hear me out and we will find a mutual resolution. Now, the terms and conditions cannot be altered after the fact. So, in fairness, let's meet in the middle and settle this. I'll process an immediate 50% refund back to the original method of payment. The refund can take 3-5 business days to reflect back depending on your bank. I think you would agree that's a fair resolution. Right, (Customer Name)?

Customer declines process a full refund

⇩

2. INSTANT REFUND – 100%

Customer declines previous offer, process full refund

Customer Threatens – AG, FTC, FEDERAL/GOV AGENCIES, DEPARTMENT OF JUSTICE

1. INSTANT REFUND – 100%

Issue a 100% Refund on the spot

Callback Procedure

If the customer hangs up, whether threatening or not, we will issue two call backs, but if the customer does not answer, we will process whatever request the customer originally called in for (cancellation, refunds, ect), schedule for a callback, and leave a detailed voicemail on the refund.

Spartacus Scripting - 3.23.17 (002).docx

Bank Rep + Customer

Agent: I think I see where the confusion may be. It shows here that the order was placed for the 14 day trial. You have that time to try out the product and once the trial ends you're billed for the initial shipment and that's why we're seeing that charge there, but since the legal terms and conditions were agreed to by placing the order we can issue an immediate 50% courtesy refund. Will that avoid any future disputes and settle this matter?

*Both parties must agree. If either party declines issue a full refund.

Bank Rep Only

Agent: I think I see where the confusion may be. It shows here that the order was placed for the 14 day trial. You have that time to try out the product and once the trial ends you're billed for the initial shipment and that's why we're seeing that charge there. Is there anyway you can conference in the customer so we can resolve this with them?

*If they conference in the customer read the above and over 50% courtesy refund

*If they cannot bring the customer on the line process a full refund and make sure to confirm this will avoid any future disputes.

From:	courtney <courtney@revlive.net>
Sent:	Monday, April 3, 2017 5:08 PM
To:	'Jade Raber' <jade@revlive.net>; javier@revlive.net; 'Lindsey Martinez' <lindsey@revlive.net>; 'Brooke Nelson' <brooke@revlive.net>; 'Kayla' <kayla@revlive.net>; adrian@revlive.net; carl@revlive.net; 'Jenny Johnson' <jenny@revlive.net>; 'Neil Aragon' <neil@revlive.net>
Subject:	RE: New Clients - SCT (Spartacus, Cobra & Tiberius)
Attach:	Cobra-Tiberius Training Guide.docx; Spartacus Training Guide.docx

Good Morning!

I have updated the Training Guides for Spartacus, Cobra and Tiberius. The offer maps were a little off then what I originally had sent. Everything else remained the same. I have updated them in Dropbox as well.

Please let me know if you have any questions or concerns.

Thank you,
Courtney

From: courtney [mailto:courtney@revlive.net]
Sent: Wednesday, March 22, 2017 2:56 PM
To: 'Jade Raber' <jade@revlive.net>; 'javier@revlive.net' <javier@revlive.net>; 'Lindsey Martinez' <lindsey@revlive.net>; 'Brooke Nelson' <brooke@revlive.net>; 'Kayla' <kayla@revlive.net>; 'adrian@revlive.net' <adrian@revlive.net>; 'carl@revlive.net' <carl@revlive.net>; 'Jenny Johnson' <jenny@revlive.net>; 'Neil Aragon' <neil@revlive.net>
Subject: RE: New Clients - SCT (Spartacus, Cobra & Tiberius)

Good Afternoon Team,

Here is the training guide for Cobra and Tiberius. I have also uploaded it into DropBox.

Please let me know if you have any questions or concerns. Please also let me know if there is anything that I need to change/add.

Thank you,
Courtney

From: Jade Raber [mailto:jade@revlive.net]
Sent: Wednesday, March 22, 2017 2:38 PM
To: courtney@revlive.net; javier@revlive.net; 'Lindsey Martinez' <lindsey@revlive.net>; Brooke Nelson <brooke@revlive.net>; 'Kayla' <kayla@revlive.net>; adrian@revlive.net; carl@revlive.net; Jenny Johnson <jenny@revlive.net>; Neil Aragon <neil@revlive.net>
Subject: RE: New Clients - SCT (Spartacus, Cobra & Tiberius)

Hey guys,

There were some scripting errors for the save sale in the old documents. I have made the corrections and attached the new versions.

Basically the save sale is for $18.71 but the scripting still had $19.99 in the verbiage. This has been corrected and updated ☺

Thanks!

Jade Raber

From: Jade Raber
Sent: Wednesday, March 22, 2017 12:44 PM
To: courtney@revlive.net; javier@revlive.net; 'Lindsey Martinez'; Brooke Nelson; 'Kayla'; adrian@revlive.net; carl@revlive.net; Jenny Johnson; Neil Aragon
Subject: New Clients - SCT (Spartacus, Cobra & Tiberius)

Hello everyone,

Attached you will find Spartacus Scripting, offer map and call flow. Please let me know if there are any questions or concerns with this.

Javier – Can we please get this out to the field so we can begin training on this?

Luxury brands will soon follow!

Lindsey/Courtney – This is your scripting for offers. Please let me know if there are any questions or concerns with this!

Thank you everyone!

Jade Raber

Director of Customer Success
RevLive, LLC
O: 720-907-1986
C: 219-510-2239
Jade@revlive.net
Skype: Jaderevlive

From: courtney [mailto:courtney@revlive.net]
Sent: Tuesday, March 21, 2017 4:32 PM
To: javier@revlive.net; 'Lindsey Martinez'; Jade Raber; Brooke Nelson; 'Kayla'; adrian@revlive.net; carl@revlive.net; Jenny Johnson; Neil Aragon
Subject: RE: New Clients - SCT (Spartacus, Cobra & Tiberius,)

Good Afternoon Team,

Here is the training guide for Spartacus. I have also uploaded it into DropBox.

You will notice quite a difference then the previous training guides. This has a completely different set up as it reflects RevLive's new layout. All the Sub-Dispostions now have their own offer map that will pull. The training guide lay out those different offer maps. The threat/refund policy, bank rep, refund time frame, call back

procedure and reship policies now have their own section.

Please let me know if you have any questions or concerns. Please also let me know if there is anything that I need to change/add.

Thank you,
Courtney

From: Javier Quintana [mailto:javier@revlive.net]
Sent: Wednesday, March 8, 2017 5:04 PM
To: 'Lindsey Martinez' <lindsey@revlive.net>; 'Jade Raber' <jade@revlive.net>; 'Brooke Nelson' <brooke@revlive.net>; courtney@revlive.net; 'Kayla' <kayla@revlive.net>; adrian@revlive.net; carl@revlive.net; 'Jenny Johnson' <jenny@revlive.net>; 'Neil Aragon' <neil@revlive.net>
Subject: RE: New Clients - SCT (Spartacus, Cobra & Tiberius,)

This has been sent to Domestic Centers.

From: Lindsey Martinez [mailto:lindsey@revlive.net]
Sent: Wednesday, March 8, 2017 3:08 PM
To: 'Jade Raber' <jade@revlive.net>; 'Brooke Nelson' <brooke@revlive.net>; courtney@revlive.net; javier@revlive.net; 'Kayla' <kayla@revlive.net>; adrian@revlive.net; carl@revlive.net; 'Jenny Johnson' <jenny@revlive.net>; 'Neil Aragon' <neil@revlive.net>
Subject: New Clients - SCT (Spartacus, Cobra & Tiberius,)

Hey Team,

We have 3 new clients coming on board called **SCT – Spartacus, Cobra & Tiberius**, similar to Dynamic, Baza, and Commerce.

They will be using Limelight, and will have a separate Limelight login for each client. They are going to be launching Male Enhancement and Jewelry -Trial offers, and this is a **60 day test!!!**

Spartacus -

Endurotest

Paravex

Cobra –

Woman's Watch

Sunglasses

Men's Watch

Handbag

Jewelry

<u>Tiberius –</u>

Woman's Watch

Sunglasses

Men's Watch

Handbag

Jewelry

I am still waiting on the labels/landing pages and will send over once I have them.

They will have a customized refund policy, and will be using **Regular Multiple Handle**. They are expecting around **600** calls per day.

Javier - Please pass this info along to the call centers. **He is Pure domestic.**

Carl – We will not be handling his emails at this time.

Let me know if there are any questions.

Thanks!
Lindsey

Cobra-Tiberius Training Guide.docx

Cobra & Tiberius Training Guide

- **Greeting** – Must be used on every call. Please pay attention to the brand popping up in RevLive to determine which brand to use.
    - *"Thank you for calling customer care, my name is _____. May I please have your name and zip code?"*
    - After customer explains their issue, please repeat it back to them so the customer knows you were listening to their concern.

- This is a multi-handle client, **NOT PROACTIVE**. You should only assist with an additional product should the customer bring it up.

- **Locating Account** – If the IVR recognizes the customer, it will automatically pull up their account. If it does not, the fastest way to locate the customer is by searching their last name and zip code. You can also search in LimeLight and that will help you see if they have more than 1 brand.
    - Make sure you're searching under the right brand in RevLive. Especially if you can locate them in LimeLight, but not RevLive.

- **Verification** – Once you have located their account, the customer must verify their first and last name, zip code, and email on file. This is to make sure you have located the correct account.
    - After verifying the customer and understanding their issue, please **review the CRM Notes tab and any transactions on the account.**
    - This is to make sure you are up to date with any conversations the customer has had with us previously and also what they have been charged.
    - This will help de-escalate customers and gain a better resolution of the call.

- **Hold** – If you need time to review and understand the history of the account, kindly ask the customer if it's ok to put them on a brief hold. You **must** check in with them every 30 seconds. Once removing from hold, you must thank the customer for holding as well.

Updated 4/3/2017

Cobra-Tiberius Training Guide.docx

In-Trial:

1) **Price:**
   a) 10% Reduced Continuity
   b) 20% Reduced Continuity
   c) 29% Reduced Continuity
   d) $19.99 Early Cancel Save Sale
   e) Early Clean Cancel

2) **Not Working/Didn't Like:**
   a) Scripting **plus** Swap Product
   b) More Scripting **plus** Swap Product
   c) 29% Reduced Continuity
   d) $19.99 Early Cancel Save Sale
   e) Early Clean Cancel

3) **Adverse Reaction:**

There will be no adverse reactions as these are luxury products. Such as watches, jewelry, hand bags, etc.

4) **Not Received:**
   a) Scripting
   b) 7 day Trial Extension **plus** Reship
   c) 10 day Trial Extension **plus** Reship
   d) 10 day Trial Extension **plus** 29% Reduced Continuity **plus** Reship
   e) Early Clean Cancel

5) **Returned To Sender:**
   a) Early Clean Cancel

6) **Not Satisfied with Previous Resolution:**
   a) Scripting

7) **Didn't Understand When Ordering:**
   a) 29% Reduced Continuity
   b) $19.99 Early Cancel Save Sale
   c) Early Clean Cancel

SAME DAY ORDER:

The customer will have 1 hour to void the account after they have placed the order. If you do not have an offer to void, verify in LimeLight if the product was sent to fulfillment. If the product was not sent to fulfillment, you must offer all ECSS' before offering to void the order. If the customer does not accept an ECSS, complete a void in LimeLight and process an ECC on the offer map.

PX23 Attachment O-24

Cobra-Tiberius Training Guide.docx

Ongoing:

1) **Price:**
   a) 20% Reduced Continuity
   b) 49% Reduced Continuity
   c) 35% Refund **plus** 59% Reduced Continuity
   d) Clean Cancel
   e) Bank 50% Refund
   f) Bank 100% Refund

2) **Not Working/Didn't Like: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) 10 day Billing Extension
   c) 59% Reduced Continuity
   d) Clean Cancel
   e) Bank 50% Refund
   f) Bank 100% Refund

3) **Adverse Reaction: *Please refer to threat refund policy when threats are made**

   There will be no adverse reactions as these are luxury products. Such as watches, jewelry, hand bags, etc.

4) **Not Received: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) 7 day Billing Extension **plus** Reship
   c) 40% Reduced Continuity **plus** 10 day Billing Extension **plus** Reship
   d) Clean Cancel
   e) Bank 50% Refund
   f) Bank 100% Refund

5) **Returned To Sender: *Please refer to threat refund policy when threats are made**
   a) Clean Cancel **plus** Reship
   b) 50% Reduced Continuity
   c) Bank 50% Refund
   d) Bank 100% Refund

6) **Not Satisfied with Previous Resolution:**
   a) Scripting

7) **Didn't Understand When Ordering: *Please refer to threat refund policy when threats are made**
   a) 50% Reduced Continuity
   b) Clean Cancel
   c) 58% Reduced Continuity
   d) Bank 50% Refund
   e) Bank 100% Refund

PX23 Attachment O-25

Threat/Refund Policy: *Please use this threat refund policy when threats are made

This client does not issue any refunds without threats. If the customer is not threatening, do NOT offer a refund.

1) If customer threatens Bank, Dispute, Credit Card Company, Social Media, Lawyer, Scam or Consumer Affairs, you must offer a 35% refund. If they are not satisfied with a 35% refund, you may offer a 50% refund. If the customer is still not satisfied you may offer a 100% immediate refund.
2) If customer threatens BBB, Police or has a Bank Rep on the line, you must offer a 50% refund. If they are not satisfied with a 50% refund, you may offer a 100% immediate refund.
3) If customer threatens Attorney General, Federal Trade Commission, Federal Agencies or Department of Justice, you must offer a 100% immediate refund.
   a. If the customer uses ambiguous/generic threat – please probe to find out what they are threatening. (Example: "I am going to report this" – Ask "Ma'am/Sir, where are you going to report this?")
   b. If the customer **HAS FILED A DISPUTE** already, please let customer know that we cannot help them further on their account.

Type of Offer	Threats	Action to be Taken
35%/50%/100% Offer	Bank, Dispute, Credit Card Company, Media, lawyer, Scam, Consumer Affairs	Offer 35% / if not satisfied 50% / if not satisfied 100%
50%/100% Offer	BBB, Police, Bank Rep on the Line	Offer a refund of 50% / If not satisfied refund 100%. *This includes when bank rep is on the line.
Immediate 100% Refund	Government Agencies: Attorney General, FTC, Federal Agencies, Department of Justice	Offer an immediate 100% refund as soon as this type of threat is mentioned.
100% Including S&H	Fraud Claims - Claiming Not to Have Ordered Trial	Offer an immediate 100% refund In Trial. Escalate for S&H charges

Bank Rep Policy:

1) Please explain the T&C and that the customer received all disclosures when placing the order.
2) **DO NOT** offer a refund unless specifically requested by the bank rep. You **must** negotiate partial refunds with a bank rep (50% before 100%).
3) If the bank rep or customer requests refunds on S&H, please escalate for refunds.

Refund Time Frame Policy

1) If the customer was issued a partial refund or a full immediate refund, they will receive it within **3-5 business days** depending on their bank.

Cobra-Tiberius Training Guide.docx

Call Back Procedure:

1) If the customer hangs up the phone without accepting resolution, call customer back twice. If the customer does not answer, process whatever was requested by the customer.
2) Schedule for a callback to leave detailed voicemail on the resolution processed.

Reship Policy

1. Verify the address
2. Check the tracking number on www.USPS.com
3. Based on the findings, choose one of the following options:
   a) Notify customer of the expected arrival time if USPS shows package has an expected delivery date.
   b) Offer trial extension if applicable.
   c) When USPS shows a confirmed delivery, ask the customer to check with their local post office to make sure the package has not been held by them.
      - Have the customer call back if a reship is still needed.
      - If customer states that USPS advises that they did not deliver the product, advise the customer that USPS will need to send us a document stating that they did not deliver it to customerservice@documentationreview.com

PX23 Attachment O-27

Spartacus Training Guide.docx

Spartacus Training Guide

- **Greeting** – Must be used on every call. Please pay attention to the brand popping up in RevLive to determine which brand to use.
    - *"Thank you for calling customer care, my name is _____. May I please have your name and zip code?"*
    - After customer explains their issue, please repeat it back to them so the customer knows you were listening to their concern.

- This is a multi-handle client, **NOT PROACTIVE**. You should only assist with an additional product should the customer bring it up.

- **Locating Account** – If the IVR recognizes the customer, it will automatically pull up their account. If it does not, the fastest way to locate the customer is by searching their last name and zip code. You can also search in LimeLight and that will help you see if they have more than 1 brand.
    - Make sure you're searching under the right brand in RevLive. Especially if you can locate them in LimeLight, but not RevLive.

- **Verification** – Once you have located their account, the customer must verify their first and last name, zip code, and email on file. This is to make sure you have located the correct account.
    - o After verifying the customer and understanding their issue, please **review the CRM Notes tab and any transactions on the account.**
    - This is to make sure you are up to date with any conversations the customer has had with us previously and also what they have been charged.
    - This will help de-escalate customers and gain a better resolution of the call.

- **Hold** – If you need time to review and understand the history of the account, kindly ask the customer if it's ok to put them on a brief hold. You **must** check in with them every 30 seconds. Once removing from hold, you must thank the customer for holding as well.

Spartacus Training Guide.docx

In-Trial:

1) **Price:**
   a) 35% Reduced Continuity
   b) 40% Reduced Continuity
   c) 50% Reduced Continuity
   d) $19.99 Early Cancel Save Sale
   e) Early Clean Cancel

2) **Not Working:**
   a) 7 day Trial Extension
   b) 35% Reduced Continuity **plus** 7 day Trial Extension
   c) 10 day Trial Extension **plus** 50% Reduced Continuity
   d) $19.99 Early Cancel Save Sale
   e) Early Clean Cancel

3) **Adverse Reaction:**
   a) 7 day Trail Extension
   b) 10 day Trial Extension **plus** 50% Reduced Continuity
   c) Early Clean Cancel

4) **Not Received:**
   a) Scripting
   b) 7 day Trial Extension **plus** Reship
   c) 10 day Trial Extension **plus** Reship
   d) 10 day Trial Extension **plus** 40% Reduced Continuity **plus** Reship
   e) Early Clean Cancel

5) **Returned To Sender:**
   a) Early Clean Cancel

6) **Didn't Understand When Ordering:**
   a) 50% Reduced Continuity
   b) $19.99 Early Cancel Save Sale
   c) Early Clean Cancel

7) **Not Happy With Previous Resolution:**
   a) Scripting

Updated 4/3/2017

Spartacus Training Guide.docx

SAME DAY ORDER:

The customer will have 1 hour to void the account after they have placed the order. If you do not have an offer to void, verify in LimeLight if the product was sent to fulfillment. If the product was not sent to fulfillment, you must offer all ECSS' before offering to void the order. If the customer does not accept an ECSS, complete a void in LimeLight and process an ECC on the offer map.

Ongoing:

1) **Price:**
   a) 50% Reduced Continuity
   b) 65% Reduced Continuity
   c) 73% Reduced Continuity
   d) Clean Cancel
   e) Bank 50% Refund
   f) Bank 100% Refund

2) **Not Working: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) 10 day Billing Extension
   c) 58% Reduced Continuity
   d) Clean Cancel
   e) Bank 50% Refund
   f) Bank 100% Refund

3) **Adverse Reaction: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) Clean Cancel
   c) Bank 50% Refund
   d) Bank 100% Refund

4) **Not Received: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) 7 day Billing Extension **plus** Reship
   c) 40% Reduced Continuity **plus** 10 day Billing Extension **plus** Reship
   d) Clean Cancel **plus** Reship
   e) Bank 50% Refund
   f) Bank 100% Refund

Updated 4/3/2017

Spartacus Training Guide.docx

5) **Returned To Sender: *Please refer to threat refund policy when threats are made**
   a) Clean Cancel **plus** Reship
   b) 50% Reduced Continuity
   c) Bank 50% Refund
   d) Bank 100% Refund

6) **Didn't Understand When Ordering: *Please refer to threat refund policy when threats are made**
   a) 50% Reduced Continuity
   b) Clean Cancel
   c) 58% Reduced Continuity
   d) Bank 50% Refund
   e) Bank 100% Refund

Threat/Refund Policy: *Please use this threat refund policy when threats are made

This client does not issue any refunds without threats. If the customer is not threatening, do NOT offer a refund.

1) If customer threatens Bank, Dispute, Credit Card Company, Social Media, Lawyer, Scam or Consumer Affairs, you must offer a 35% refund. If they are not satisfied with a 35% refund, you may offer a 50% refund. If the customer is still not satisfied you may offer a 100% immediate refund.
2) If customer threatens BBB, Police or has a Bank Rep on the line, you must offer a 50% refund. If they are not satisfied with a 50% refund, you may offer a 100% immediate refund.
3) If customer threatens Attorney General, Federal Trade Commission, Federal Agencies or Department of Justice, you must offer a 100% immediate refund.
   a. If the customer uses ambiguous/generic threat – please probe to find out what they are threatening. (Example: "I am going to report this" – Ask "Ma'am/Sir, where are you going to report this?")
   b. If the customer **HAS FILED A DISPUTE** already, please let customer know that we cannot help them further on their account.

Updated 4/3/2017

Spartacus Training Guide.docx

Type of Offer	Threats	Action to be Taken
35%/50%/100% Offer	Bank, Dispute, Credit Card Company, Media, lawyer, Scam, Consumer Affairs	Offer 35% / if not satisfied 50% / if not satisfied 100%
50%/100% Offer	BBB, Police, Bank Rep on the Line	Offer a refund of 50% / If not satisfied refund 100%. *This includes when bank rep is on the line.
Immediate 100% Refund	Government Agencies: Attorney General, FTC, Federal Agencies, Department of Justice	Offer an immediate 100% refund as soon as this type of threat is mentioned.
100% Including S&H	Fraud Claims - Claiming Not to Have Ordered Trial	Offer an immediate 100% refund In Trial. Escalate for S&H charges

Bank Rep Policy:

1) Please explain the T&C and that the customer received all disclosures when placing the order.
2) **DO NOT** offer a refund unless specifically requested by the bank rep. You **must** negotiate partial refunds with a bank rep (50% before 100%).
3) If the bank rep or customer requests refunds on S&H, please escalate for refunds.

Refund Time Frame Policy

1) If the customer was issued a partial refund or a full immediate refund, they will receive it within **3-5 business days** depending on their bank.

Call Back Procedure:

1) If the customer hangs up the phone without accepting resolution, call customer back twice. If the customer does not answer, process whatever was requested by the customer.
2) Schedule for a callback to leave detailed voicemail on the resolution processed.

Updated 4/3/2017

Spartacus Training Guide.docx

<u>Reship Policy</u>

1. Verify the address
2. Check the tracking number on www.USPS.com
3. Based on the findings, choose one of the following options:
    a) Notify customer of the expected arrival time if USPS shows package has an expected delivery date.
    b) Offer trial extension if applicable.
    c) When USPS shows a confirmed delivery, ask the customer to check with their local post office to make sure the package has not been held by them.
        -   Have the customer call back if a reship is still needed.
        -   If customer states that USPS advises that they did not deliver the product, advise the customer that USPS will need to send us a document stating that they did not deliver it to customerservice@documentationreview.com

Updated 4/3/2017

PX23 Attachment O-33

From:	courtney <courtney@revlive.net>
Sent:	Friday, February 17, 2017 4:45 PM
To:	Jade Raber <jade@revlive.net>; 'Brooke Nelson' <brooke@revlive.net>; adrian@revlive.net; 'Kayla' <kayla@revlive.net>; Javier <javier@revlive.net>
Cc:	'Jenny Johnson' <jenny@revlive.net>; 'Lindsey Martinez' <lindsey@revlive.net>
Subject:	ECommerce Essentials Training Guide
Attach:	ECommerce Training Guide.docx

Good Morning Team,

Here is the training guide for Ecommerce Essentials. I have also uploaded it into DropBox.

Please let me know if you have any questions or concerns. Please also let me know if there is anything that I need to change/add.

Thank you,
Courtney

ECommerce Training Guide.docx

ECommerce Essentials Training Guide

- **Greeting** – Must be used on every call.
    - *"Thank you for calling customer service, how may I help you?"*
    - After customer explains their issue, please repeat it back to them so the customer knows you were listening to their concern.

- This is a multi-handle client, **NOT PROACTIVE**. You should only assist with an additional product should the customer bring it up.

- **Locating Account** – If the IVR recognizes the customer, it will automatically pull up their account. If it does not, the fastest way to locate the customer is by searching their last name and zip code.
    - Make sure you're searching under the right brand in RevLive.

- **Verification** – Once you have located their account, the customer must verify their first and last name, zip code, and email on file. This is to make sure you have located the correct account.
    - After verifying the customer and understanding their issue, please **review the CRM transactions tab and any previous interactions**.
    - This is to make sure you are up to date with any conversations the customer has had with us previously and also what they have been charged.
    - This will help de-escalate customers and gain a better resolution of the call.

- **Hold** – If you need time to review and understand the history of the account, kindly ask the customer if it's ok to put them on a brief hold. You **must** check in with them every 30 seconds. Once removing from hold, you must thank the customer for holding as well.

PX23 Attachment O-35

Promotions:

RevLive:

ID	Date	Type	Amount
7743	02-16-2017	SALE	$4.95

- The customer will be charged S&H and will receive a full 30 day supply of the product with a 14 day trial period.
- If customer states they do not have enough time to try the product, offer an additional 10 day extension.

- If customer calls to cancel **IN TRIAL**:
  - This client does allow **SAME DAY ORDER** voids for **8 HOURS ONLY**.
  - If the customer calls in within 8 hours of placing the order, there will be an available option on the offer map. "Early Recent Charge Refund – 100% refund ($ amount) – 8 hours to offer". ***If you do not see this offer, do not offer a void as the product was sent to fulfillment.***
    - You do not have to make save sale offers, instead process the Early Recent Charge Refund offer on the offer map. **DO NOT** void the account in the CRM.
- If the customer calls in to cancel their order after the 8 hours, follow the offer map in order and make save sale offers.
    - 10 day extension, ECSS $38.71, ECSS $28.71, and ECSS $18.71, ECR
  - Once a save sale is accepted, advise it will be the last charge and they will receive a confirmation email within 24 hours.
  - If customer likes the product and wishes to continue, advise on full cost of the product.
  - If full cost is too expensive, we can offer a reduced continuity up to 60% off the full cost of the product, however, you must start with a lower discount first. **Customer must still accept a save sale offer for trial product before we can offer discounts on future shipments**.
    - If customer wishes to continue monthly at a reduced continuity, the account must be added to escalated queue to be processed.
  - If all save sale offers are declined, process ECR. Customer will receive an email confirmation within 24 hours confirming the cancellation of the order.
  - **If at any point threats are made (listed on threat chart), we should not make save sale offers and instead just process ECR.** (By still offering save sales, we will only escalate the customer even more.)
  - Once the trial period expires, the customer will be charged the full cost of the product and enrolled in our monthly subscription.

ECommerce Training Guide.docx

- If customer calls to cancel **OUTSIDE OF TRIAL** (EOT or Ongoing):
    - Educate on the benefits of the product and offer a reduced continuity up to 60% off the full cost of the product, however, you must start with a lower discount first.
        - Please make sure to check the CRM Transactions tab to see if the customer is already receiving a discounted offer. If they are, we should not offer this again.
    - If customer declines continuity offer, advise we can process a clean cancel to prevent future shipments or charges. They will also receive a confirmation email within 24 hours.
    - If customer starts asking for a refund, please explain the T&C so the customer understands the reason for the charge. If customer is still asking for a refund, follow the offer map and offer partial refunds.
        - 15%, 35%, 50%.
- If customer makes a generic threat, please probe to find out what they are threatening.
    - Example: "I am going to report this." Then ask: "Ma'am/Sir, where are you going to report this?"
- If customer brings up a dispute or investigation – verify that no dispute has been filed.
    - If a dispute **has been filed**:
        - Advise the customer that the dispute must be dropped before we can issue a refund. To verify this, request that the customer makes a 3 way call with their bank so the bank can confirm there is no dispute.
- If customer is threatening, you **MUST** offer the 35% refund and the 50% refund **BEFORE** you offer the 100% RMA.
    - **Threats include:** BBB, AG, chargeback, Credit Card Company, Bank.
      Not Valid Threats include: Lawyer, News, Social Media do <u>NOT</u> qualify for a refund!
- Bank Rep On The Line:
    - Please explain the T&C and that the customer received all disclosures when placing the order.
    - You <u>MUST</u> negotiate partial refunds with the bank rep. Please offer 50% refund and then 100% refund.

ECommerce Training Guide.docx

Refund Time Frame Policy

- If the customer was issued a partial refund or a full immediate refund, they will receive it within **3-5 business days** depending on their bank.
- This client **does** have a 30 day time frame on refunds. We should not be offering refunds on charges that are older than 30 days. ***The only time you can offer refunds on charges over 30 days old is when there is a bank rep on the line.***

Reship Policy

1. Verify the address.
2. Check the tracking number on www.USPS.com.
3. Then, based on the findings, choose one of the following options:
   a) Notify them of the expected arrival time if USPS shows package is in transit to be delivered soon.
   b) Offer trial extension if applicable.
   c) When USPS shows a confirmed delivery, ask the customer to check with their local post office to make sure the package has not been held by the post office.
      - Have the customer call back if a reship is still needed.
      - If customer states that USPS advises that they did not deliver the product, advise the customer that USPS will need to send us a document stating that they did not deliver it to customerservice@documentationreview.com

From:	courtney <courtney@revlive.net>
Sent:	Wednesday, April 5, 2017 10:11 PM
To:	'Lindsey Martinez' <lindsey@revlive.net>; 'Jade Raber' <jade@revlive.net>; 'Brooke Nelson' <brooke@revlive.net>; 'Javier Quintana' <javier@revlive.net>; 'Neil Aragon' <neil@revlive.net>; 'Adrian' <adrian@revlive.net>; 'Kayla' <kayla@revlive.net>; carl@revlive.net; 'Jenny Johnson' <jenny@revlive.net>
Subject:	RE: New Client - Eleven 4 Media - QA
Attach:	Eleven-4 QA.docx; Eleven-4 Training Guide.docx

Good Afternoon,

I have completed the QA process for Eleven-4 Media. Attached are the results.

Jade – the landing page is not active

I have also attached the training guide, as well as uploaded it into Dropbox.

Please let me know if you have any questions or concerns.

Thank you,
Courtney

From: Lindsey Martinez [mailto:lindsey@revlive.net]
Sent: Wednesday, April 5, 2017 3:18 PM
To: 'Jade Raber' <jade@revlive.net>; 'Brooke Nelson' <brooke@revlive.net>; 'Javier Quintana' <javier@revlive.net>; 'Neil Aragon' <neil@revlive.net>; courtney@revlive.net; 'Adrian' <adrian@revlive.net>; 'Kayla' <kayla@revlive.net>; carl@revlive.net; 'Jenny Johnson' <jenny@revlive.net>
Subject: New Client - Eleven 4 Media - QA

Hi Team,

Full set-up has been completed for **Eleven 4 Media's** 2 Trial brands. Attached is the testing.
EmbovaRX
EmbovaT

Javier – Please give the call centers a heads up that they should start seeing calls for this new client soon.

Courtney – Please QA the Revlive set-up. This is a mutual client so you will not need to QA the Five9 portion.

Let me know if anyone has any questions.

Thanks!

Lindsey Martinez
Go Live! Manager
RevLive, LLC
303-835-7372

RevLive   Eleven-4 QA.docx

REV**LIVE**
WHERE YOUR SUCCESS IS OUR LIFE

New Brand Launch Checklist

CLIENT INFORMATION

Client Name:	Eleven-4 Media
QA Name:	Courtney Masters
Brands Launching:	EmbovaRX & EmbovaT
Date of QA:	April 5, 2017

CHECKLIST					ADDITIONAL NOTES:
☑	☑	☐	☐	Verify PDF files are uploaded	
☑	☑	☐	☐	Verify greeting has been added and is correct	
☑	☑	☐	☐	Verify alerts have been set up under the "Client Tab"	
☑	☑	☐	☐	Verify special instructions have been added in refund policy	
☑	☑	☐	☐	Verify Multiple Handle settings. Verify settings on brand, special instructions, and brand refund policy – all should house this information	
☑	☑	☐	☐	Verify refund policy and special instructions hold S1, S2, ect information	
☑	☑	☐	☐	Verify on same-day **void** process – Verify refund policy, offer map, and special instructions if needed	
☑	☑	☐	☐	Verify threat policy with brand details and offer map	
☑	☑	☐	☐	Verify RMA/return policy matches brand details and offer map	
☑	☑	☐	☐	Verify any special note needed for any of the offers	
☑	☑	☐	☐	Verify any disclosures given to customers in offers – what client specified	
☐	☐	☐	☐	Verify landing pages are up to date and clickable links	Landing Page is not working
☑	☑	☐	☐	Verify training materials have been sent from GoLive/Kari	
☐	☐	☐	☐	Verify client information matches terms and conditions – Trial length – EOT/PT/Ongoing Charges	Landing Page is not working
☐	☐	☐	☐	Call telephone numbers on landing pages (on product) – Test Call – Make sure up to date in RevLive	Landing Page is not working
☑	☑	☐	☐	Call point to numbers to verify connection with RevLive – Test Calls	
☑	☑	☐	☐	Verify Billing Tiers have been set up	
☐	☐	☐	☐	Make sure that Carl has email credentials, if we are handling their emails.	We are not handling emails
S1	S2	S3	S4		

<u>Eleven-4 Training Guide</u>

- **Greeting** – Must be used on every call.
    - *"Thank you for calling customer service. My name is _____, how may I assist you today?"*
    - After customer explains their issue, please repeat it back to them so the customer knows you were listening to their concern.

- This is a multi-handle client, **NOT PROACTIVE**. You should only assist with an additional product should the customer bring it up.

- **Locating Account** – If the IVR recognizes the customer, it will automatically pull up their account. If it does not, the fastest way to locate the customer is by searching their last name and zip code. You can also search in LimeLight.
    - Make sure you're searching under the right brand in RevLive. Especially if you can locate them in LimeLight, but not RevLive.

- **Verification** – Once you have located their account, the customer must verify their first and last name, zip code, and email on file. This is to make sure you have located the correct account.
    - After verifying the customer and understanding their issue, please **<u>review the CRM transactions tab and any previous interactions</u>**.
    - This is to make sure you are up to date with any conversations the customer has had with us previously and also what they have been charged.
    - This will help de-escalate customers and gain a better resolution of the call.

- **Hold** – If you need time to review and understand the history of the account, kindly ask the customer if it's ok to put them on a brief hold. You **<u>must</u>** check in with them every 30 seconds. Once removing from hold, you must thank the customer for holding as well.

Promotions:

- The customer will be charged S&H and will receive a full 30 day supply of the product with a 14 day trial period.
- If customer states they do not have enough time to try the product, offer an additional 10 day extension.

- If customer calls to cancel **IN TRIAL**:
  - If **SAME DAY ORDER**:
    - If the customer calls in on the same day that they placed the order and would like to cancel, you must offer all ECSS' before offering to cancel the shipment.
      - 10 day extension, ECSS $38.71, ECSS $28.71, and ECSS $18.71, ECC
  - If the customer does not accept an ECSS, verify in LimeLight if the product was sent to fulfillment. If the product was not sent to fulfillment, complete a void in LimeLight and process an ECC on the offer map.
  - If it is not a same day order, follow the offer map in order and make save sale offers.
  - Once a save sale is accepted, advise it will be the last charge and will receive a confirmation email within 24 hours.
  - If customer likes the product and wishes to continue, advise on full cost of the product.
  - If full cost is too expensive, we can offer a reduced continuity up to 60% off the full cost of the product, however, you must start with a lower discount first. **Customer must still accept a save sale offer for trial product before we can offer discounts on future shipments**.
    - If customer wishes to continue monthly at a reduced continuity, the account must be added to escalated queue to be processed.
  - If all save sale offers are declined, process ECC. Customer will receive an email confirmation within 24 hours confirming the cancellation of the order.
  - **If at any point threats are made (listed on threat chart), we should not make save sale offers and instead just process ECC.** (By still offering save sales, we will only escalate the customer even more.)
  - Once the trial period expires, the customer will be charged the full cost of the product and enrolled in our monthly subscription.

- If customer calls to cancel **OUTSIDE OF TRIAL** (EOT or Ongoing):
  - Educate on the benefits of the product and offer the reduced ongoing continuity of 50% off the full cost of the product.
    - Please make sure to check the CRM Transactions tab to see if the customer is already receiving a discounted offer. If they are, we should not offer this again.
  - If declines continuity offer, advise we can process a clean cancel to prevent future shipments or charges. They will also receive a confirmation email within 24 hours.
  - If customer starts asking for a refund, please explain the T&C so the customer understands the reason for the charge. If customer is still asking for a refund, follow the offer map and offer partial refunds.

Eleven-4 Training Guide.docx

Refund Policy

Refunds are **Only for THREATENING customers. NO THREATS = NO REFUNDS.**

Valid threats include: BBB, AG, Chargeback, Credit Card Company, Bank

Invalid threats include: Lawyer, News, Social Media

- If a customer is threatening, you must offer 50% refund first. If the customer is not satisfied with the 50% refund you can offer a 100% refund, but the customer must return the product before the refund can be issued.
- Bank Rep On The Line:
    - Please explain the T&C and that the customer received all disclosures when placing the order.
    - Advise the bank rep that you will process an **immediate 100% refund** for the most recent charge only.
        o If the bank rep requests additional refunds, you must place the account in the escalated queue.

Refund Time Frame Policy

- If the customer was issued a partial refund or a full immediate refund, they will receive it within **5-7 business days** depending on their bank.
- This client **does** have a 30 day time frame on refunds. We should not be offering refunds on charges that are older than 30 days. ***The only time you can offer refunds on charges over 30 days old is when there is a bank rep on the line.***

Reship Policy

1. Verify the address.
2. Check the tracking number on www.USPS.com.
3. Then, based on the findings, choose one of the following options:
    a) Notify them of the expected arrival time if USPS shows package is in transit to be delivered soon.
    b) Offer trial extension if applicable.
    c) When USPS shows a confirmed delivery, ask the customer to check with their local post office to make sure the package has not been held by the post office.
        - Have the customer call back if a reship is still needed.
        - If customer states that USPS advises that they did not deliver the product, advise the customer that USPS will need to send us a document stating that they did not deliver it to customerservice@documentationreview.com

From:	courtney <courtney@revlive.net>
Sent:	Wednesday, April 5, 2017 2:59 PM
To:	'Jade Raber' <jade@revlive.net>; javier@revlive.net; 'Lindsey Martinez' <lindsey@revlive.net>; 'Kayla' <kayla@revlive.net>; kimber@revlive.net; 'Brooke Nelson' <brooke@revlive.net>; Adrian@revlive.net
Cc:	'jenny' <jenny@revmountain.com>
Subject:	RE: New Client - Monoceros Connections - Training Documents
Attach:	Monoceros Training Guide.docx

Good Morning Team,

Here is the training guide for Monoceros. I have also uploaded it into DropBox. It is set up exactly like Spartacus.

Please let me know if you have any questions or concerns. Please also let me know if there is anything that I need to change/add.

Thank you,
Courtney

From: Jade Raber [mailto:jade@revlive.net]
Sent: Tuesday, April 4, 2017 12:52 PM
To: javier@revlive.net; Lindsey Martinez <lindsey@revlive.net>; courtney@revlive.net; Kayla <kayla@revlive.net>; kimber@revlive.net; Brooke Nelson <brooke@revlive.net>; Adrian@revlive.net
Cc: jenny <jenny@revmountain.com>
Subject: RE: New Client - Monoceros Connections - Training Documents

Hey team,

Attached you will find the missing Endovex label.

You will also find the landing pages listed below:

https://yourshoppers-sources.com/ - 855-765-7911 - Step 1 --- Endovex
https://yourshoppers-resource.com - 855-765-7911 - Step 2 --- Paratest

Javier – Can you please get this out to the centers?

Thank you!
Jade Raber

From: Jade Raber
Sent: Monday, April 03, 2017 7:02 PM
To: javier@revlive.net; Lindsey Martinez; courtney@revlive.net; Kayla; kimber@revlive.net; Brooke Nelson; Adrian@revlive.net
Cc: jenny
Subject: New Client - Monoceros Connections - Training Documents

Hey Guys,

We are launching a new client called – Monoceros Connections. They will be launching two new Trial offer brands. These are male enhancement and are the same as Spartacus.

This client will be also be LimeLight. The below trials are 14 day trials.

Endovex – PDF Not Included Just Yet - Step 1 ($93.99)
Paratest – Attached As JPG - Step 2 ($93.39)

Attached is the scripting and refund policy.

They will be using **REGULAR** Multiple Handle, and they will have the same offers and refund policy as Spartacus

Return Address:	PO Box 319 - 2215 Steeles Ave. W., North York, ON M3J 0J2

Javier – Can you please send this on to the call centers? This is the exact same offers as Spartacus. Landing pages will follow soon!

Please let me know if there are any questions!

Thanks!
Jade Raber

Monoceros Training Guide.docx
Monoceros Training Guide

- **Greeting** – Must be used on every call. Please pay attention to the brand popping up in RevLive to determine which brand to use.
    - *"Thank you for calling customer care, my name is _____. May I please have your name and zip code?"*
    - After customer explains their issue, please repeat it back to them so the customer knows you were listening to their concern.

- This is a multi-handle client, **NOT PROACTIVE**. You should only assist with an additional product should the customer bring it up.

- **Locating Account** – If the IVR recognizes the customer, it will automatically pull up their account. If it does not, the fastest way to locate the customer is by searching their last name and zip code. You can also search in LimeLight and that will help you see if they have more than 1 brand.
    - Make sure you're searching under the right brand in RevLive. Especially if you can locate them in LimeLight, but not RevLive.

- **Verification** – Once you have located their account, the customer must verify their first and last name, zip code, and email on file. This is to make sure you have located the correct account.
    - After verifying the customer and understanding their issue, please **review the CRM Notes tab and any transactions on the account.**
    - This is to make sure you are up to date with any conversations the customer has had with us previously and also what they have been charged.
    - This will help de-escalate customers and gain a better resolution of the call.

- **Hold** – If you need time to review and understand the history of the account, kindly ask the customer if it's ok to put them on a brief hold. You **must** check in with them every 30 seconds. Once removing from hold, you must thank the customer for holding as well.

Monoceros Training Guide.docx

In-Trial:

1) **Price:**
   a) 35% Reduced Continuity
   b) 40% Reduced Continuity
   c) 50% Reduced Continuity
   d) $19.99 Early Cancel Save Sale
   e) Early Clean Cancel

2) **Not Working:**
   a) 7 day Trial Extension
   b) 35% Reduced Continuity **plus** 7 day Trial Extension
   c) 10 day Trial Extension **plus** 50% Reduced Continuity
   d) $19.99 Early Cancel Save Sale
   e) Early Clean Cancel

3) **Adverse Reaction:**
   a) 7 day Trail Extension
   b) 10 day Trial Extension **plus** 50% Reduced Continuity
   c) Early Clean Cancel

4) **Not Received:**
   a) Scripting
   b) 7 day Trial Extension **plus** Reship
   c) 10 day Trial Extension **plus** Reship
   d) 10 day Trial Extension **plus** 40% Reduced Continuity **plus** Reship
   e) Early Clean Cancel

5) **Returned To Sender:**
   a) Early Clean Cancel

6) **Didn't Understand When Ordering:**
   a) 50% Reduced Continuity
   b) $19.99 Early Cancel Save Sale
   c) Early Clean Cancel

7) **Not Happy With Previous Resolution:**
   a) Scripting

Monoceros Training Guide.docx

SAME DAY ORDER:

The customer will have 1 hour to void the account after they have placed the order. If you do not have an offer to void, verify in LimeLight if the product was sent to fulfillment. If the product was not sent to fulfillment, you must offer all ECSS' before offering to void the order. If the customer does not accept an ECSS, complete a void in LimeLight and process an ECC on the offer map.

Ongoing:

1) **Price:**
   a) 50% Reduced Continuity
   b) 65% Reduced Continuity
   c) 73% Reduced Continuity
   d) Clean Cancel
   e) Bank 50% Refund
   f) Bank 100% Refund

2) **Not Working: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) 10 day Billing Extension
   c) 58% Reduced Continuity
   d) Clean Cancel
   e) Bank 50% Refund
   f) Bank 100% Refund

3) **Adverse Reaction: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) Clean Cancel
   c) Bank 50% Refund
   d) Bank 100% Refund

4) **Not Received: *Please refer to threat refund policy when threats are made**
   a) Scripting
   b) 7 day Billing Extension **plus** Reship
   c) 40% Reduced Continuity **plus** 10 day Billing Extension **plus** Reship
   d) Clean Cancel **plus** Reship
   e) Bank 50% Refund
   f) Bank 100% Refund

Monoceros Training Guide.docx

5) **Returned To Sender: *Please refer to threat refund policy when threats are made**
   a) Clean Cancel **plus** Reship
   b) 50% Reduced Continuity
   c) Bank 50% Refund
   d) Bank 100% Refund

6) **Didn't Understand When Ordering: *Please refer to threat refund policy when threats are made**
   a) 50% Reduced Continuity
   b) Clean Cancel
   c) 58% Reduced Continuity
   d) Bank 50% Refund
   e) Bank 100% Refund

Threat/Refund Policy: *Please use this threat refund policy when threats are made

This client does not issue any refunds without threats. If the customer is not threatening, do NOT offer a refund.

1) If customer threatens Bank, Dispute, Credit Card Company, Social Media, Lawyer, Scam or Consumer Affairs, you must offer a 35% refund. If they are not satisfied with a 35% refund, you may offer a 50% refund. If the customer is still not satisfied you may offer a 100% immediate refund.

2) If customer threatens BBB, Police or has a Bank Rep on the line, you must offer a 50% refund. If they are not satisfied with a 50% refund, you may offer a 100% immediate refund.

3) If customer threatens Attorney General, Federal Trade Commission, Federal Agencies or Department of Justice, you must offer a 100% immediate refund.
   a. If the customer uses ambiguous/generic threat – please probe to find out what they are threatening. (Example: "I am going to report this" – Ask "Ma'am/Sir, where are you going to report this?")
   b. If the customer **HAS FILED A DISPUTE** already, please let customer know that we cannot help them further on their account.

Monoceros Training Guide.docx

Type of Offer	Threats	Action to be Taken
35%/50%/100% Offer	Bank, Dispute, Credit Card Company, Media, lawyer, Scam, Consumer Affairs	Offer 35% / if not satisfied 50% / if not satisfied 100%
50%/100% Offer	BBB, Police, Bank Rep on the Line	Offer a refund of 50% / If not satisfied refund 100%. *This includes when bank rep is on the line.
Immediate 100% Refund	Government Agencies: Attorney General, FTC, Federal Agencies, Department of Justice	Offer an immediate 100% refund as soon as this type of threat is mentioned.
100% Including S&H	Fraud Claims - Claiming Not to Have Ordered Trial	Offer an immediate 100% refund In Trial. Escalate for S&H charges

Bank Rep Policy:

1) Please explain the T&C and that the customer received all disclosures when placing the order.
2) **DO NOT** offer a refund unless specifically requested by the bank rep. You **must** negotiate partial refunds with a bank rep (50% before 100%).
3) If the bank rep or customer requests refunds on S&H, please escalate for refunds.

Refund Time Frame Policy

1) If the customer was issued a partial refund or a full immediate refund, they will receive it within **3-5 business days** depending on their bank.

Call Back Procedure:

1) If the customer hangs up the phone without accepting resolution, call customer back twice. If the customer does not answer, process whatever was requested by the customer.
2) Schedule for a callback to leave detailed voicemail on the resolution processed.

Monoceros Training Guide.docx

Reship Policy

1. Verify the address
2. Check the tracking number on www.USPS.com
3. Based on the findings, choose one of the following options:
   a) Notify customer of the expected arrival time if USPS shows package has an expected delivery date.
   b) Offer trial extension if applicable.
   c) When USPS shows a confirmed delivery, ask the customer to check with their local post office to make sure the package has not been held by them.
      - Have the customer call back if a reship is still needed.
      - If customer states that USPS advises that they did not deliver the product, advise the customer that USPS will need to send us a document stating that they did not deliver it to customerservice@documentationreview.com

From:	kari@revlive.net
Sent:	Monday, January 30, 2017 8:03 PM
To:	kayla@revlive.net
Cc:	jenny@revlive.net; lindsey@revlive.net; Jade Raber <jade@revlive.net>
Subject:	Pure Beauty Training Guide
Attach:	Pure Beauty Training Guide.docx

Hey ladies,

I wasn't sure who to send this to you so I included all of you. I really didn't have much info to go off of, so a lot of this is mirrored to DBC.

Only thing we are waiting to hear back on is the same day void process (waiting for DBC, Divine Youth, and now Pure Beauty). As of right now, the offer is set for 36 hours and Jade is confirming if that is what the client wants as it will be sent to fulfillment within that time frame. I have left that highlighted in green on the training guide until we have an answer on that.

Please let me know if you have any questions or want me to make any updates to this!

Thanks,
Kari Torberson

Pure Beauty Training Guide.docx

Pure Beauty
Training Guide

- **Greeting** – Must be used on every call.
    - *"Thank you for calling Customer Care. My name is _____. How may I assist you today?"*
    - After the customer explains their issue, please repeat it back to them so the customer knows you were listening to their concern.

- This is a **Proactive** multi-handle client. You must search in LimeLight/Konnektive to see how many products the customer ordered and not wait for them to bring it up. We need to assist with all brands that the customer ordered.

- **Locating Account** – If the IVR recognizes the customer, it will automatically pull up their account. If it does not, the fastest way to locate the customer is by searching their last name and zip code. You can also search in LimeLight/Konnektive and that will help you see if they have more than 1 brand.
    - Make sure you're searching under the right brand in RevLive. Especially if you can locate them in LimeLight/Konnektive, but not in RevLive.

- **CRM Selection** – This client has 3 separate CRMs for their products so it's important that you are searching under the correct one to locate the customer.
    - In RevLive, they will be identified as the brand followed by Limelight 1, Limelight 2, or Konnektive.
    - Example: The brand **Total Garcinia** will have 3 separate brands in RevLive: **Total Garcinia Limelight 1, Total Garcinia Limelight 2, and Total Garcinia Konnektive**.
    - You will have a separate login for Limelight 1, Limelight 2, and Konnektive. (Please be aware that not all agents will have access to Konnektive).

- **Verification** – Once you have located their account, the customer must verify their first and last name, zip code, and email on file. This is to make sure you have located the correct account.

- After verifying the customer and understanding their issue, please **review the CRM transactions tab and any previous interactions**.
    - This is to make sure you are up to date with any conversations the customer has had with us previously and also what they have been charged.
    - This will help de-escalate customers and gain a better resolution of the call.

- **Hold** – If you need time to review and understand the history of the account, kindly ask the customer if it's ok to put them on a brief hold. You **must** check in with them every 30 seconds. Once removing from hold, you must thank the customer for holding as well.

Pure Beauty Training Guide.docx

Trial Promotion

RevLive:

ID	Date	Product Type	Tracking Number	Amount
1111945	01-17-2017	In Trial	9400110200881281486706	$5.97

LimeLight:

Order ID	Date/Time Stamp	Customer Name	Customer Email	Product Name	Amount	Qty	Campaign Name (ID)	Shipping Type
108508	01/21/2017 03:05am	Claudia Komorowski	Claudiakomorowski@yaho...	Total Garcinia Trial (111)	$0.00	1	Total + Garcinia Mobile (A20) (24)	USPS S1 (1) $4.95

- The customer will be charged S&H and will receive a full 30 day supply of the product with a 14 day trial period.
- If customer states they do not have enough time to try the product, offer an additional 10 day extension.

- If customer calls to cancel **IN TRIAL**:
  - If **SAME DAY ORDER**:
    - You do not have to make save sale offers and instead process the offer: "Early Recent Charge Refund – 100% refund ($ amount) – 36 hours to offer".
      - This will void the order automatically so you do not have to manually void these accounts in the CRM.
  - If not same day order, follow the offer map in order and make save sale offers.
    - 10 day extension, ECSS $38.71, ECSS $28.71, and ECSS $18.71
  - Once a save sale is accepted, advise it will be the last charge and will receive a confirmation email within 24 hours.
  - If customer likes the product and wishes to continue, advise on full cost of the product.
  - If full cost is too expensive, we can offer a reduced continuity of 50% off the full cost of the product. **Customer must still accept a save sale offer for trial product before we can offer discounts on future shipments**.
    - If wishes to continue monthly at full cost or reduced continuity, must be added to escalated queue to be processed.
  - If all save sale offers are declined, process ECR and provide return instructions (they will also receive this via email).
  - **If at any point threats are made (listed on threat chart), we should not make save sale offers and instead just process ECR. (**By still offering save sales, we will only escalate the customer even more.)
  - Once the trial period expires, the customer will be charged the full cost of the product and enrolled in our monthly subscription.

Pure Beauty Training Guide.docx

- If customer calls to cancel **OUTSIDE OF TRIAL** (EOT or Ongoing):
    - Educate on the benefits of the product and offer the reduced ongoing continuity of 50% off the full cost of the product.
        - Please make sure to check the CRM Transactions tab to see if the customer is already receiving a discounted offer. If they are, we should not offer this again.
    - If declines continuity offer, advise we can process a clean cancel to prevent future shipments or charges. They will also receive a confirmation email within 24 hours.
    - If customer starts asking for a refund, please explain the T&C so the customer understands the reason for the charge.
    - Refunds are **Only for THREATENING customers. NO THREATS = NO REFUNDS.**

Type of Offer	Threats	Action to be Taken
25%/50% Offer	Social Media/Complaints Boards, etc. (any type of online threat).	Offer 25% / if not satisfied 50%.
50%/100% Offer	Bank Dispute (Bank rep on line)/Credit Card Company (Stop Payment, etc.).	Offer a refund of 50%. If not satisfied refund 100%. *This includes when bank rep is on the line.
Immediate 100% Refund	Government Agencies: CPA, Consumer Council, Police, Interpol, Attorney General, State Exchange Commission (SEC), Federal Trade Commission (FTC) or other Government Agency.	Offer an immediate 100% refund as soon as this type of threat is mentioned.

- If makes threat listed in **Blue**:
    - Must offer 25% and if not accepted, 50%.
- If makes threat listed in **Green** OR if a bank rep:
    - Must offer 50% and if not accepted, 100%.
- If makes threat listed in **Orange**:
    - Must offer an immediate refund of 100%.

- If customer makes a generic threat, please probe to find out what they are threatening.
    - Example: "I am going to report this." Then ask: "Ma'am/Sir, where are you going to report this?"

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- If customer brings up a dispute or investigation – verify that no dispute has been filed.
  - If a dispute **has been filed**:
    - Advise the customer that the dispute must be dropped before we can issue a refund. To verify this, request that the customer makes a 3 way call with their bank so the bank can confirm there is no dispute.

- ❖ **These refunds should be offered on the most recent charge. This client does <u>NOT</u> have a 30 day time frame on refunds so we can refund as far back as needed, as long as it's the most recent charge.**

- ❖ **If customer is requesting for multiple charges to be refunded, they must say a threat listed in ORANGE. If a threat in ORANGE is made, we can refund the second most recent charge.**
  - Bank Rep **DOES NOT** qualify for multiple refunds as it is listed in **GREEN**.
  - These must be added to the escalated queue to be refunded.

- If customer makes a threat listed in **Blue** and hangs up before you can make offers:
  - A call back needs to be completed. If the call back is unsuccessful, then **no refund should be issued**.
- If customer makes a threat listed in **Green** or **Orange** and hangs up before you can make offers:
  - A call back needs to be issued, <u>twice</u>. If the second call back is unsuccessful, then a **full refund should be issued**.

- <u>Bank Rep On The Line</u>:
  - Please explain the T&C and that the customer received all disclosures when placing the order.
  - DO NOT offer a refund unless specifically requested by the bank rep. You **<u>must</u>** negotiate partial refunds with a bank rep (50% before 100%).

Refund Time Frame Policy

- If the customer was issued a partial refund or a full immediate refund, they will receive it within **<u>5-7 business days</u>** depending on their bank.
- This client does not have a 30 day time frame on refunds. We can refund as far back as needed, as long as it's the most recent charge.
- If customer requests multiple charges to be refunded, we can refund the second most recent charge if they make a threat listed in **ORANGE.**

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Reship Policy

1. Verify the address.
2. Check the tracking number on www.USPS.com.
3. Then, based on the findings, choose one of the following options:
    a) Notify them of the expected arrival time if USPS shows package is in transit to be delivered soon.
    b) Offer trial extension if applicable.
    c) When USPS shows a confirmed delivery, ask the customer to check with their local post office to make sure the package has not been held by the post office.
        -   Have the customer call back if a reship is still needed.
    d) Request a reship if package is showing as delivered by USPS but the customer hasn't received the package and they have already checked with their local post office.
    e) If a customer says upfront that people are stealing mail at their address, ask them to provide a secure address, then update the address and request a reship.